

Checklist for Expediting SSI/SSDI for Homeless Adults with Serious Mental Illness

I. Population

1. How many adults who are homeless and who have mental illness/co-occurring disorders do you currently assist (who presumably have serious mental illnesses as their principal cause of disability) per year?
2. How many additional people do you believe need such assistance? Do you have a census (count) of homeless adults who need assistance and likely don't receive it?
3. Are there areas of your state that don't have such services?

II. Current Practices

1. What programs in your system currently assist homeless adults with SSI/SSDI?
2. Who makes up the staff in these programs? Case managers? Mental health social workers? Psychiatrists? Other physicians? Psychologists?
3. Are there referral sources you need to work with besides those from which you currently receive referrals?
4. What are the procedures they use? Is there a particular model they're using?
5. What do you find works well in your current effort? Poses difficulties?
6. What areas do you feel you need to improve?

III. Staffing

1. How do you need to enhance or re-configure the staff to expand/intensify a SSI/SSDI effort?
2. Who would you need to add to the staff to make a SSI/SSDI effort successful? Who are missing?
3. Would you structure the staff using a benefits outreach team, on-site benefits specialists, outreach benefits specialists? Other? What changes, if any, will this involve?
4. How will you provide quality review of applications prior to submission?

IV. Training

1. What initial training does the staff require?
2. What ongoing training needs do you foresee?
3. Who will take the lead on organizing and responding to requests for training? How will you promote the trainings?
4. How will you identify trainers to send to the SOAR Train-the-Trainer program in December? How will you ensure that they are available to conduct trainings on an on-going basis?
5. How will you ensure that necessary staff throughout your system are trained?
6. How will you ensure that physicians, psychiatrists, and psychologists are informed/trained to assist with this effort and do needed evaluations?

V. Collaboration with Medical Providers

1. Who in your system provides psychiatric care? Primary care? Is this to homeless people?
2. Who will you involve in doing psychiatric evaluations? How will these be done, if needed, on an outreach basis? Do you need to address funding/reimbursement for

such evaluations? Is there retroactive Medicaid you can use? How will you structure this?

3. Are there medical/graduate schools to involve in collaboration for evaluations?
4. Are there critical physical health providers (e.g., HCH) that will assist in providing both physical—and perhaps—mental health evaluations?
5. How will you be able to work with the medical records department to gather medical records?
6. How will you work out the issue of collection of medical records/ evidence?

VI. Communication with SSA and the DDS

1. What SSA/DDS offices do you need to involve in this effort? Are there relationships currently existing between your system and SSA/DDS? Are there any dedicated SSADDs staff who work specifically on homeless issues and coordinate services for homeless people?
2. Do you have a relationship with your SSA regional homeless liaison? With local and/or district offices?
3. What procedures, if any, do you currently have with SSA to expedite claims? With DDS?
4. If needed, how will you enhance communication with SSA and DDS?

VII. Other Collaborations

1. Are there other organizations or key stakeholders within the community that you could partner with in your efforts to access SSI/SSDI benefits for people (e.g., hospitals, correctional facilities, Safe Havens, existing outreach programs)?
2. How might you collaborate with these programs or agencies?
3. Are there any procedures/efforts you want to put into place—or have in place—to prevent homelessness through addressing SSI/SSDI as part of discharge planning/release planning from hospitals and jails?
4. How can you involve your State Medicaid office in supporting these collaborations and pursuing retroactive Medicaid payments for services?
5. If you have State public assistance benefits, is there a mechanism worked out for retroactive repayment of these benefits from SSA?
6. How will you arrange for representative payee services for applicants once they get their benefits?

VIII. Outcomes and Assessment

1. How will you know your efforts are increasing access to SSA disability benefits?
2. What outcome data will you collect?
3. How will that be set up?
4. Who will take responsibility for coordinating this?
5. Who will collect and report on the data?

IX. Implementation of Action Plan

1. Who will lead and ensure the implementation of your action plan?
2. When and how often will you meet?
3. What is your timeline for implementation?
4. How will you involve others as needed for consultation?
5. How will you get the word out about what you are doing so that others can benefit from/build upon your efforts?